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**State of Vermont**  
**Vermont Department of Education**  
120 State Street  
Montpelier, VT 05620-2501

To: Special Education Directors

From: Margaret C. Schelley  
Assistant Director for Special Ed Finance & Medicaid

Date: September 2, 2009

Subject: IEP and Evaluation Rate Survey

The Department of Education recently received information from the Center for Medicaid Services (CMS) about required changes to the IEP and Evaluation claims process for the School-Based Health Services Program. New claim forms have been developed and sent to the Medicaid clerks for use beginning with IEP and Evaluation meetings held 9/1/09 and later.

In addition to revised claim forms, the department needs to establish rates consistent with the guidelines established by CMS. Attached is a survey designed to assist the department in establishing a rate for the IEP and Evaluation claims. Once the department receives the information, the new rates will be established and billing for IEP and Evaluation claims will be able to be submitted again.

Please complete the attached survey and return to  
Department of Education  
Attn: Nicole Tousignant  
120 State Street  
Montpelier, VT 05620-2501

Medicaid clerks will be unable to bill IEP and Evaluation claims until the completed surveys are returned to the Department.

If you have any questions while completing the report, please feel free to call Nicole Tousignant at 802-828-5111.

**School-Based Health Services Program  
IEP and Evaluation Claim Rate Survey  
September 2009**

**IEP Claims**

The revised definition of Targeted Case Management (which is the Medicaid category that allows the billing of IEP and Evaluation claims) does not allow for the billing of activities that are considered to be responsibilities of the IDEA process. Some of the activities that were billed for in the past but are no longer allowable include:

- Contacting parent/guardian to set date for IEP meeting
- Printing out Notice of Meeting
- IEP meeting date was confirmed with other team members
- Typing finalized IEP
- Sending copy of new IEP to parent/guardian along with a copy of Parental Rights
- Distributing copy of new IEP to team members

The allowable activities that will be billed for in the future are limited to the following:

- Reviewing most recent eligibility determination
- Reviewing testing/evaluation results
- Reviewing process reports
- Reviewing student's existing IEP goals
- Gathering information from other providers/parents regarding student and student's performance
- Compiling and interpreting information regarding present levels of performance
- IEP pre-meeting to discuss issues with other providers
- Visits to home, childcare, etc. to collect additional student information
- Classroom observation
- Interpretation and compilation of information to develop the IEP
- IEP Meeting to develop goals and plan of services
- Initial coordination of services

**Required Survey Response**

Please provide the Department of Education with the average time a case manager spends completing the allowable activities listed above associated with the IEP process for your supervisory union. Do not include the time it takes to complete an initial IEP or an IEP revision/amendment.

Supervisory Union Name: \_\_\_\_\_

Average time Case Manager spends on allowable activities when developing the annual IEP: \_\_\_\_\_

Special Education Administrator Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**School-Based Health Services Program  
IEP and Evaluation Claim Rate Survey  
September 2009**

**Evaluation Claims**

The revised definition of Targeted Case Management (which is the Medicaid category that allows the billing of IEP and Evaluation claims) does not allow for the billing of activities that are considered to be responsibilities of the IDEA process. Some of the activities that were billed for in the past but are no longer allowable include:

- Phoning/contacting parent/guardian to set date for Evaluation Planning meeting
- Sending notice of Evaluation Planning Team meeting with a copy of Parental Rights
- Sending Evaluation Plan and Consent for Reevaluation form to parent/guardian
- Typing written evaluation report
- Distributing Evaluation Plan to other team members

The allowable activities that will be billed for in the future are limited to the following:

- Reviewing student's records prior to evaluation planning meeting
- Requesting input from service providers and team members to begin the evaluation
- Meeting to plan evaluation
- Arranging and scheduling testing/assessment with other providers
- Assessment/conduct testing
- Gathering information from other providers/parent regarding student and student's performance
- Visits to home, childcare etc...
- Classroom observation
- Interpreting information and testing results from other providers
- Eligibility determination meeting
- Interpretation and compilation of information to develop the Evaluation Report

**Required Survey Response**

Please provide the Department of Education with the average time a case manager spends completing the allowable activities listed above associated with the reevaluation process for your supervisory union. Do not include the time it takes to complete an initial evaluation or an evaluation completed through the form 8 process.

Supervisory Union Name: \_\_\_\_\_

Average time Case Manager spends on allowable activities when completing a reevaluation: \_\_\_\_\_

Special Education Administrator Signature: \_\_\_\_\_

Date: \_\_\_\_\_